# Gender and Results Workshop:

# Building Technical Expertise

**(October 12-15, 1999)**
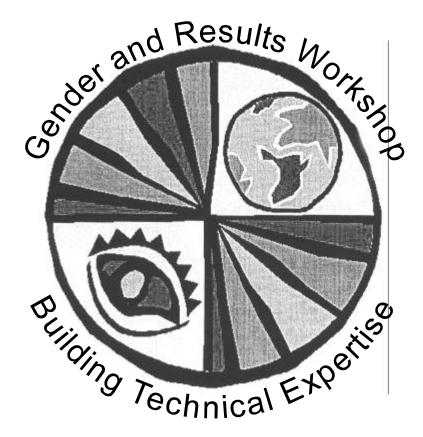
July 2000

## WID TECH

A Women in Development Technical Assistance Project

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Development Alternatives, Inc. **!** International Center for Research on Women
Academy for Educational Development **!** Development Associates, Inc.

# Gender and Results Workshop
# Building Technical Expertise

by

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July 2000



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# FOREWORD

Between October 12 and 15, 1999, USAID's Office of Women in Development (G/WID) and WIDTECH, a project implemented by Development Alternatives, Inc., the International Center for Research on Women, Academy for Educational Development, and Development Associates, Inc., sponsored a four-day training workshop for USAID Mission staff in Arlington, Virginia. The workshop focused on obtaining better results in development programs by integrating gender. Thirty USAID officers from field programs around the world attended.

This workshop relied on the commitment, imagination, and hard work of a number of people. Particular thanks go to the technical specialists and facilitation specialists who created the workshop program. The technical training specialists were Marcia Greenberg (WIDTECH) and Susan Jay (USAID/D&G) for Democracy and Governance; Bagie Sherchand (DAI) and Elaine Zuckerman (WIDTECH consultant) for Economic Growth and Agricultural Development, with assistance from Deborah Rubin (WIDSTRAT); Mary Hill Rojas (WIDTECH) and Kara Page (WIDTECH consultant) for the Environment; and Estelle Quain (USAID/PHN), with considerable collaboration of Deborah Caro (WIDSTRAT), for Population, Health, and Nutrition. Facilitation and training specialists from the Training Resources Group (TRG) were John Pettit, Laura Guyer-Miller, and Stephanie Schalk-Zaitsev. The TRG team made a major contribution to workshop success. They worked with technical specialists to design their tracks and interactive exercises. They created and led sessions on facilitation, strategic influencing, and presentation. They worked closely with the workshop leaders to design the workshop agenda. They also created an exemplary workshop notebook for participants. Anne Fleuret (WIDSTRAT) provided useful advice on performance monitoring in the context of results.

Hilary Sims Feldstein, WIDTECH Training Specialist, led the design and implementation of the workshop. Margaret Lycette, Director, USAID Office of Women in Development, provided useful contributions to the conceptualization of workshop objective and activities. Kara Page provided innovative and committed assistance to overall workshop planning and implementation. Yvonne Chavis provided logistical help, keeping track of registrants, hotel arrangements, and a myriad of other details. Carolyn Dunlap helped transform papers into packets and flipcharts into texts.

WIDTECH colleagues Rekha Mehra, Tulin Pulley, and Cecilia Bazan provided back-up support and were ready with assistance when asked.

Most of all, many thanks go to the 30 women and men participants who brought their commitment to women's inclusion in social and economic development and their good ideas, experiences, questions, and enthusiasm to a very full four-day workshop program.

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**For Further Information on USAID's Office of Women in Development
and the WIDTECH Project, See These Web Sites:**

- USAID/G/WID Site: http://www.genderreach.com
- WIDTECH Project: http://www.widtech.org

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# ACRONYMS

| | |
|---|---|
| ADS | Automatic Directive Service |
| AFR | Africa |
| ANE | Asia and Near East |
| APRP | Agricultural Policy Reform Project (Egypt) |
| BCC | Behavior Change Communication |
| CRC | Constitutional Reform Commission (Guyana) |
| CSP | Country Strategic Plan |
| DAI | Development Alternatives Inc. |
| D&G | Democracy and Governance |
| DHS | Demographic Health Surveys |
| E&E | Europe and Eurasia |
| EGAD | Economic Growth and Agricultural Development |
| ENV | Environment |
| EXO | Executive Officer |
| G/WID | Office of Women in Development |
| IEC | Information, Education, Communication |
| IR | Intermediate Result |
| LAC | Latin American and Caribbean |
| MALR | Ministry of Agriculture and Land Reclamation (Egypt) |
| M&E | Monitoring and Evaluation |
| MSP | Microenterprise/Small Producers (Peru Project) |
| NGO | Non-government Organization |
| PHN | Population, Health, and Nutrition |
| PPC | Office of Policy & Program Coordination |
| PRA | Participatory Rural Appraisal |
| RCSA | Regional Center for Southern Africa |
| REDSO | Regional Economic Development Services Office/East and Southern Africa |
| RFA | Request For Assistance |
| RFP | Request For Proposal |
| SO | Strategic Objective |
| SOW | Scope of Work |
| STD | Sexually Transmitted Disease |
| USAID | U.S. Agency for International Development |
| WID | Women in Development |
| WIIFM | What's In It For Me |

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# GENDER AND RESULTS WORKSHOP REPORT
# OCTOBER 12-15, 1999

# MARRIOTT RESIDENCE INN, ARLINGTON

## KEY ISSUES

## Group Findings

\#   A gender lens delineates the people-oriented elements for activities directed to achieving results, people-specific constraints to participation, and the distribution of positive and negative effects of such activities.

\#   The collection of gender-disaggregated data at each opportunity—customer service plans, demographic health surveys (DHS), and baselines for planned activities and for monitoring and evaluating all activities—provides Missions with the data necessary to identify gender-specific opportunities and constraints for achieving results.

\#   Applying a gender lens presents options for including attention to women, men, and children. What is important and strategic to include in any particular program will depend on the country and situation context and on the specific aims of the strategic objectives (SOs) and sector.

\#   The development of Mission gender committees made up of representatives from each SO team and other office units are proving to be an effective mechanism for integrating gender into Mission planning and implementation.

\#   The process of giving gender weight in the evaluation criteria of RFAs and RFPs is technically challenging. Groups using such an exercise found that it helped them pay greater attention throughout the construction of a scope of work.

\#   Regional roundtables revealed a consistent concern with four major issues: (a) violence against women; (b) women's access to resources, particularly land; (c) effects of privatization, globalization, and trade, particularly on women's economic opportunities; and (d) women's advocacy and political participation.

\#   There is a strong desire for more frequent communication to the field by G/WID about new issues, lessons learned, best practices, and the like.

## Organizers' Conclusions

\# Joint preparation of training with the USAID global centers resulted in technically specific interactive presentations and exercises that targeted key issues and key USAID instruments.

\# Missions are increasingly sending non-WID Officers to such technically focused training.

\# The recently revised Automatic Directive System (ADS) to require the inclusion of gender in RFAs and RFPs has stimulated renewed interest in technically oriented gender training.

### BACKGROUND

## Rationale

The Agency has made great strides in integrating gender concerns into its programs and SOs. Increasingly, Missions are recognizing the importance of gender as a factor in the achievement of sustainable results. USAID is supporting a variety of innovative approaches in girls' education, reproductive health, and women's legal rights and political participation, among other issues. The Agency also leads the way in the institutionalization of gender concerns with the nearly completed implementation of the Gender Plan of Action (Annex 1).

During 1999, in collaboration with G/WID, USAID's Bureau for Policy and Program Coordination (PPC) undertook to amend specific policies in the ADS to require that requests for agreements (RFAs: for grants and cooperative agreements) and requests for proposals (RFPs: for contracts) include attention to gender and to weight it appropriately in the evaluation criteria used to judge submissions to these processes. These changes are spelled out in detail in Annex 2. Eventually, the Agency will integrate gender into planning, implementation, and assessment requirements for all programs.

Although there are improvements in knowledge and in supporting USAID instruments, there still has been a lag between increased recognition of the value of addressing gender issues and actual programmatic change. Mission staff often tell us they understand the need to address gender issues throughout their programs, but have difficulty identifying how to do so in the context of their day-to-day work. Much of this work relates to designing SO and results packages, assessing customer interests, crafting RFAs and RFPs to undertake actual programs as well as provide specific technical assistance, and tracking this effort through a performance monitoring plan. To address the need for integrating gender into such activities, a Gender and Results Workshop was planned, focusing on USAID instruments and processes with attention to key substantive issues in four goal areas of USAID: Democracy and Governance (D&G); Economic Growth and Agricultural Development (EGAD); Environment (ENV), and Population, Health, and Nutrition (PHN). Invitations were sent to

all Missions in May 1999 and they were encouraged to send up to three people, SO team members and/or partners, and WID Officers.

## Preparation

Interactive technically specific exercises were designed for this workshop. They were created by joining technical specialists in D&G, EGAD, ENV, and PHN with facilitation and training specialists from the Training Resources Group (TRG). The technical specialists were asked to work with the relevant global centers to determine key issues to be addressed and to locate sample RFPs, scopes of work, and other instruments to use as models and examples. They also consulted participant choices and experience expressed in a pre-workshop survey questionnaire. Once key ideas and instruments were identified and materials gathered, each technical team worked intensively with TRG collaborators to develop six-hour training tracks with three to four interactive exercises each. This worked particularly well with D&G and PHN. PHN has an active in-house Gender Working Group, which has already worked through some of the issues of integrating gender into scopes of work and other Mission instruments. One working group leader was the technical specialist for this workshop and was able to vet the materials with her colleagues as well as begin adapting them for future uses. D&G has an active training program and an officer with responsibility for addressing gender issues in D&G work. The D&G gender specialist and the WIDTECH D&G specialist developed the materials for the workshop and modified these materials for a subsequent D&G training for staff from all Missions.

Participants in the 1998 WID Officers' Workshop rated sessions on facilitation skills, strategic influencing, and presentation very high. For the Gender and Results Workshop, these sessions were led by John Pettit, Laura Guyer-Miller, and Stephanie Schalk-Zaitsev of TRG. Some participants requested one-on-one technical assistance on a particular activity or process for their Mission. They sent materials ahead, and WIDTECH identified sector gender experts to work with them.

## PARTICIPANTS

Thirty participants from USAID Missions attended the workshop. Of these, nine were from Africa (Angola, South Africa, Tanzania, Zambia, Regional Center for Southern Africa (RCSA) and Regional Economic Development Services Office/East and Southern Africa (REDSO/ESA), 11 from Asia/Near East (Egypt, Indonesia, Morocco, and the Philippines), two from Europe and Eurasia (Armenia and Russia), and 8 from Latin America/Caribbean (Bolivia, Dominican Republic, Ecuador, Guyana, Haiti, Panama, and Peru). Of all participants, only 10 were WID Officers; the majority were representatives of SO teams or supporting offices with no official gender/WID responsibilities. Five were direct hires, including one Mission Director (Guyana) and one Deputy Director (South Africa). Over half came from six Missions sending two or three participants (Egypt, Indonesia, Morocco, Panama, Philippines, South Africa, and REDSO/ESA). Participant names and information can be found in Annex 3.

## PROGRAM

The workshop supported four days of training activities (see the complete schedule in Annex 4). The first day comprised introductions, discussion of gender and gender analysis, and an introduction to facilitation and strategic influencing. The second and third days focused on training in specific technical areas, or "tracks." At the close of each technical track, many participants received individual technical assistance on a particular activity or instrument that they had brought with them (see Annex 5). The fourth day comprised further training in facilitation and strategic influencing, a panel discussion of four Mission success stories, a regional issues luncheon, and closing. At the end of each day, participants were invited to write their reflections on what was learned and what might apply to their future work in journals included in their notebooks.

## MATERIALS

Each participant was provided a notebook with materials for use during the workshop. In addition to these materials, packets of reading were provided on gender, including USAID policy documents, and on each technical area (see Annex 6).

## DAY ONE

### Introduction to Gender

The goals of this session were that participants would be able to (1) articulate the definitions of gender, gender integration, and WID; and (2) demonstrate familiarity with USAID-specific documents and where to reference gender within them.

Laura Guyer-Miller introduced key gender definitions: WID, gender, gender analysis, and gender integration and customer (from the USAID ADS glossary). Hilary Sims Feldstein then led the discussion into a list of gender issues as points of discussion. (The definitions and discussion points can be found in Annex 7.) Most points relate to the particular circumstances and obstacles that women in most societies face and that are often the reasons why a supposedly gender-neutral program actually gender blind—that is, not seeing that women and men are affected differently. Other points focused on the power of gender analysis for achieving results. Key among the latter were:

# A gender lens helps planners differentiate key variables about men and women that will affect their respective participation in and results from planned activities. Such variables include access to and control over resources and benefits from those resources, sexual division of labor, women's and men's different knowledge, and gender relations of power.

\#   Applying a gender lens can enhance results in three ways: (1) by recognizing the potential contributions and constraints of both men and women; (2) by paying attention to women's needs and contributions that may have been ignored; and (3) by applying the same questions of difference to other groups, as well, in order to better know and serve diverse customers.

Hilary Sims Feldstein then asked participants to identify the characteristics of "the people," a "farmer," and an "entrepreneur." Participants offered a number of definitions for "the people" such as citizens, customers, stakeholders; decision-makers, opinion leaders, and end-users; and community groups, men and women counterparts. Farmer and entrepreneur evoked similar lists demonstrating the power of plural nouns to obfuscate or, with a gender lens, to draw attention to the fact that these people are actually men, women, and youth, different in their opportunities, knowledge, and constraints. Similarly, an expanded gender lens can pick up other important variables, such as ethnicity or class, to consider in better understanding who the customers are.

The session closed with a short discussion of recent changes in USAID ADS guidance that bring gender considerations directly into the development of RFAs and RFPs. Surprisingly, to many of the participants, this was new information and they welcomed the discussion and summaries provided for their use.

## Facilitation and Strategic Influencing

### *Facilitation*

In addition to understanding the value of gender integration to their work, Mission officers and others usually need to convince their colleagues of its relevance. In addition to the logical arguments, skills in facilitating discussions and in identifying different kinds of audiences are important tools. The workshop offered an introduction to both.

The goal of effective facilitation is to fully understand what the other person is saying, to show genuine interest, and to react in an appropriate manner. Facilitation skills include paraphrasing, questioning, summarizing, and encouraging. After an introduction to these concepts, participants worked in groups of three. One person, the facilitator, asked questions of the second about how gender is addressed in her or his Mission. The third person noted how frequently and how well the first person used these skills and then provided feedback at the end. Each person had an opportunity to be interviewed, to ask questions and facilitate understanding, and to observe and report on the process.

### *Strategic Influencing*

In attempting to influence the outcome of a particular idea or set of decisions, people need to be strategic about whom they hope to influence and the approach they use. The TRG

approach focuses on two dimensions of influence—agreement and trust. Looking at the degree of agreement and trust (the credibility, predictability, and reliability of a person or group of people whatever their point of view), the audience for a particular idea can be divided into five groups. These groups are allies (for example, high agreement and high trust), bedfellows, fence sitters, opponents (low agreement, high trust), or adversaries. To influence each of these types requires a different approach. Participants were asked to make an inventory of people in their workplace, separating out different groups.

Participants were then introduced into the most promising approaches to each kind of person or group. For example, with opponents, you can be clear about your own position and can state your understanding of the other's position. You can state that you value them because they will tell you the truth about their opinions and that you intend to work together to resolve problems. The final exercise was to practice planning an influencing strategy. Each participant chose one group from his or her strategic influencing inventory and identified to which type of group they belonged. The participants then determined what outcome they wanted from a conversation. With that model in mind, the participants, with the help of leading questions, planned on paper how they would start a conversation and what key points they would make in such a conversation. Finally, again in groups of three, participants practiced their approaches.


# DAY TWO


## Democracy and Governance
*Prepared by Marcia Greenberg (WIDTECH D&G Specialist) and Susan Jay (Strategies and Africa Specialist, USAID Democracy Center)*

There were two full-day D&G sessions, one for 15 participants (Day 2) and the other with six (Day 3). The participants were of heterogeneous background, some who work with D&G teams and others, such as economists or PHN specialists, who recognize the cross-sectoral importance of D&G.

The D&G training was conducted through full collaboration between Marcia Greenberg and Susan Jay, with assistance from Laura Guyer-Miller of TRG. Together, they designed and provided a training experience that offered D&G perspectives as encouraged by USAID's Center for Democracy and Governance and gender and democracy approaches as promoted by USAID's Office of Women in Development.


### Reviewing Basic Principles: Democracy and Gender and Democracy

*What Does Democracy Mean?*

The training began with a quick brainstorming session that elicited the participants' understanding of what democracy means. This session revealed their understanding that

democracy means more than just free and fair elections. To ensure that all understand the basic principles of democracy as defined by the Agency's D&G experts, Susan Jay presented a short lecture based on an article by Larry Diamond.[1] She outlined four core components of democracy: elections and political processes, rule of law, governance, and civil society.

*Symbols of How Women Contribute to Democracy*

Marcia Greenberg then presented ways to think about where the full and effective participation of women may enhance democracy results. She presented these as four symbols: face, heart, brain, and hands. The first symbol, face, reminds us that democracy involves people. Every time democracy work engages groups such as voters, constituents, mayors, and citizens, it is important to visualize their faces and think about whether women are among them. The second symbol, heart, represents putting one's heart into a goal or principle. Often women are among the most committed to democratic processes and institutions. Democracy goals may be achieved more effectively by engaging women's determination. The third, brain, was represented by "1+1+3," which symbolizes the knowledge generated, the extra value of women's input. Women often bring their experience, skills, and know-how to democracy. Lastly, the fourth symbol represented hands in partnership because women and women's organizations may be eager and effective partners for USAID's democracy programs.

## Nuts and Bolts: Getting Gender Expectations into Scopes of Work

*Teaching Example: A Sample Scope of Work*

The training session then shifted focus to the practical: looking at where and how scopes of work (for example, for RFPs) may be improved by paying attention to gender. The group went through an illustrative case, a scope of work for a democracy assessment. The case/exercise identified opportunities to integrate gender in activities, such as:

\#   Background information for a team's preparation in Washington might include review of documents such as reports on a country's compliance with the Convention on the Elimination of All Forms of Discrimination Against Women (CEDAW), Beijing +5 reports, and meetings with technical experts affiliated with the USAID Office of Women in Development.

\#   Directions regarding field research might include express directives regarding meeting with women (and other often excluded groups).

\#   Guidance regarding team composition might include the importance of not only ensuring that a team includes some gender expertise, but also verifying that the leader is open to including gender issues in a final report.

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[1]   Larry Diamond. 1999. Chapter 1: "Defining and Developing Democracy," in *Developing Democracy: Towards Consolidation*. Baltimore: Johns Hopkins Press.

The trainers took care to characterize such ideas as places where gender issues "might" be flagged, rather than where they "should" be flagged, in order to make the point that such decisions depend on three contexts: (1) how significant gender issues are in a particular country; (2) how important it is to ensure that the proposed technical assistance take account of gender; and (3) how willing an SO team or others in the Mission may be to include such language in the scope of work.

*Practical Work: Where Would You Include Gender Guidance?*

After the illustration, small groups were given a scope of work with suggestions of specific gender-related language to insert in specific text. But each group was given a different "situation"—one describing a country with good levels of women's participation and another with some problems of equity, capacity, and access. Each group was asked to consider seven to eight instances and decide whether to include the proposed gender language, and be prepared to articulate their reasoning.

The reporting out of the two groups was the basis for healthy debate. The different situations did result in some differences in inclusion of gender-related language, although there were not as many differences as one might have expected. Participants also noted that sometimes the language should not only identify concern for women, but should also be clear about expectations regarding excluded or marginalized populations, such as rural residents or youth.

## Nuts and Bolts: Results Frameworks

For the next major section of the training, results frameworks, the trainers again modeled an exercise and then gave people the opportunity to do it themselves. In this case, Susan Jay presented a component of a results framework focusing on access to justice. The sample framework had choices, gender-supportive and gender-neutral, for the I and each of 3 sub-IRs (see Table 1).

**Table 1: Access to Justice, Sample Framework**

| IR/Sub IR | Gender-Neutral Language | Gender-Supportive Language |
|---|---|---|
| IR | More Effective & Fair Legal Sector Institutions | Legal Institutions Serving Citizens More Fairly and Effectively |
| Sub IR #1 | Improved Court Management | Court Administration Becomes More Client-Focused |
| Sub IR #2 | Greater Capacity for the Ministry of Justice to Provide Professional Training | Greater Capacity for Court Personnel to Address Gender Bias |
| Sub IR #3 | Increased Access to Justice | Increased Access to Justice, particularly for women and the poor<br>*or*: Increased Availability of ADR Options |

She discussed the options and why one might find the gender-supportive option to be better not only regarding gender but also in terms of articulating more accurately the results that are sought. In a number of cases, language emphasized who would benefit—citizens.

The participants then worked in small groups to structure a local government results framework—this time making their own choices about when to use gender-supportive language. Each group then posted its final framework. Through a "gallery viewing" process, all were able to view and compare the various frameworks, both to see which options had been selected and to post questions about the basis for a group's decisions. The final frameworks and the posted questions were the basis for a facilitated discussion of options and how decisions regarding language will depend on the contexts and issues with which people are familiar. Interestingly, there was a great deal of consistency among the groups the first day and during in-depth debate the second day. This illustrates a basic principle that there are no hard-and-fast answers.

### Challenges in Improving Attention to Gender

The last session was an opportunity for people to think about some of the challenges encountered when working with women's groups or when trying to improve attention to gender. There were three scenarios (mini-case studies) for small group discussion. One focused on the common problems of women's organizations that compete with one another rather than collaborate, and of groups of elite women who lack perspective and capability with regard to rural women. The second raised issues of data and indicators—how does one get gender-disaggregated data and information about women when faced with resource constraints? The last posed the common dilemma of how USAID may provide technical assistance to those who are in power (predominantly men) without creating such disparities of capacity that newcomers (including women) do not have any real likelihood of winning office against incumbents.

The groups raised some interesting ideas. The first group suggested that maybe one should seek partner groups that are not just women's groups, post-Beijing groups, or women's advocacy organizations; rather, one might work with groups that involve women and focus on a particular service that is important to them, such as healthcare, as that group becomes more interested in the political realm. On the second challenge, the group proposed finding out about data sources from other donors and from universities. The third group acknowledged that a pre-defined target-group for certain activities limits a USAID partner organization's ability to select participants. For example, if a scope of work calls for training elected members of parliament, there may be no women trainees in that group. The group suggested, however, that in such cases, one might choose to re-conceptualize the entire activity in a way that is not tied to a narrow, pre-defined participant pool, or one might develop complementary activities to counterbalance the program that does not include women.

## *Conclusion*

On both days, the participants became invested in the subject matter and developed an understanding of the issues, challenges, and opportunities for using attention to gender as a way to improve democracy programs. By focusing on scopes of work, results frameworks, and case studies based on common challenges, they learned practical ways to integrate gender in a strategic manner that not only promotes greater gender equality but also strengthens the quality of D&G programs in D&G-specific terms.

## **Environment**
*Prepared by Kara Page (WIDTECH Consultant) and Mary Hill Rojas (WIDTECH Environment Specialist)*

The objective of the Environment session was that participants would improve their ability to:

1. Describe how gender can have an impact on environment issues;
2. Integrate gender into USAID processes and instruments; and
3. Describe the WID/gender requirements of USAID guidance.

Objective 1 was addressed in the morning sessions, Objective 2 was addressed through sessions in the afternoon, and Objective 3 was integrated throughout the day.

The training team included Mary Hill Rojas and Kara Page from WIDTECH and John Pettit from TRG.

## *Climate Setting*

The trainers introduced themselves and asked the participants to give their names and tell what they do, what Mission they are from, why they chose to attend the session, and what they hoped to learn. Participant interests ranged from wanting to learn more about environment, and how to integrate gender into strategy documents, to understanding how to build an advocacy position for adding value to policy discussions. The participants referred back to these personal goals in the concluding session.

To initiate the discussion, the trainers did an exercise to illustrate a change in thinking, or "paradigm shift." The trainers indicated they hoped to help participants shift their perspectives about gender and environment.

## *Impact of Gender on Environment: Framework and Strategies for Integrating Gender*

This session addressed Objective 1, describe how gender can have an impact on environment issues. Mary Rojas presented an introductory, interactive talk, incorporating a framework and related strategies for considering gender and environment (see box.) The framework is based on the recognition that environmental issues are social issues. Therefore, community involvement and participation become critical in addressing sustainable natural resource management and conservation. Finally, it is important to address gender and environment issues at all three levels: policy, institutional, and field.

After this introductory piece, the participants wrote down the environmental programs underway in their countries and considered them in the context of the framework presented.

The interactive session continued with a discussion of the following strategies for considering gender and environment issues: (1) gender dimensions in natural resource use; (2) environmental education and social marketing; (3) women as environmental activists and community leaders; (4) the invisibility of women; (5) obstacles to the participation of women; and (6) working across sectors.

> **Framework for Considering Gender in Environment Programs**
>
> - Examine gender within community participation
> - Identify the stakeholders, men and women
> - Address gender at three levels: policy, institutional, and field
>
> **Strategies to Considering Gender in Environment Programs**
>
> - Look at how men and women use, control, and benefit from natural resources
> - Include images of men and women in environmental education
> - Identify women community leaders and activists
> - Counteract women's invisibility in policy and programs
> - Find solutions to the obstacles women have to participation
> - Work across sectors in addressing environment issues

*Applying the Gender Framework and Strategies to Regional Experiences*

Each participant then compared the strategies presented with their programs to consider the effect of gender on the programs with which they work. They then divided into three regional groups to share their thoughts and prepare a report for the large group that responded to the following: (1) Which parts of the framework and strategies are most relevant to your region? (2) Choose the situations you have discussed in your group that are most influenced by gender. Explain how this occurs. (3) Summarize on flip charts and report to large group.

The groups found it important to work at the three levels—field, institutional, and policy. They found particularly relevant the strategies for environment education and working across sectors. The participants' programs within the Asia/Near East group that had particular relevance in this exercise were: (1) Morocco water users and microcredit programs, in which women are water users but do not make decisions, and where lack of employment outside the home forces women to create home-based businesses; (2) Indonesia coastal resource

management, integrated pest management, and microcredit programs; and (3) Philippines coastal and forest resource management programs.

The Latin American and Caribbean group identified solid waste management, small non-governmental organization grants, agroforestry, natural resource use/management planning, and environmental awareness as programs that would be well served by the framework and strategies.

The participants continued throughout the day to refer to the framework and strategies flip charts posted on the wall as a guide for their work. Evaluations at the end of the day confirmed that many participants found the framework and strategies very useful.

*Applying Gender Framework and Strategies to Case Studies*

Each of the three small groups was given a mini-case study (from Nepal, El Salvador, or Bangladesh) to read and asked to address four questions: *(1) Within the case study, what are the natural resources? (2) Who benefits from their use? (3) Who uses them? (4) Who controls them?* Participants read the case, answered the questions individually and then as a small group reached consensus on their answers, and presented their conclusions to the large group. This exercise gave the participants practice with the fundamental questions used by academics and practitioners in addressing the relationship of gender to the environment. Participants referred back to these fundamental questions several times during the day.

## Integrating Gender into USAID Instruments and Processes

*Strategic Objectives and Intermediate Results*

The afternoon session began with Mary Rojas leading an exercise on integrating gender into USAID SO and IRs. Participants were introduced to a results framework from the USAID/Guatemala regional environment program for Central America (see box). They read over the IR assigned to their small group, identified and agreed on areas where gender should be integrated, and shared those with the large group. Each group was able to identify creative and useful suggestions for including gender, such as targeting public awareness campaigns in achieving community participation toward appropriate groups, collecting data on who made up the environment NGO community, adopting policies that allow for sustainable, inclusive financing, etc. One woman noted that the IR itself was constructed with a male bias.

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**Central American Regional Environment Results Framework: Where Does Gender Fit?**

Intermediate Result (IR) #1: Central American protected areas system developed and consolidated: focuses on environmental pollution and local empowerment concerns with national parks, NGOs, and communities

IR#2: Increased local empowerment for stewardship of natural resources: coastal zone with highly participatory community and stakeholder-based approaches

IR#3: Reduced levels of contamination by key pollutants through a participatory process identified highest priorities as urban wastewater, solid waste, and pesticides

*Request For Proposal*

Kara Page presented an exercise on incorporating gender explicitly in RFPs and weighting gender in the evaluation criteria—a very new issue as called for in Contract Bulletin 99-13 (see Annex 2). Since there are no precedents, the exercise was an experiment of one way such values might be developed. An RFP from USAID/Indonesia was adapted for the task.

Participants were asked to assume the role of a small team in a Mission to address gender issues in the evaluation criteria for a new RFP and to produce a suggested number of percentage points for gender on the evaluation criteria list.

Step 1: Participants read a summary of the RFP, broke into small groups, and using a simple matrix and flip charts, each group examined one of three objectives from the RFP. Each group wrote down several illustrative, gender-sensitive activities they would expect to see in the contractor's work plan. They then estimated the importance of the gender-sensitive activities to the overall outcome of that specific objective. Based on their estimate, they assigned a rough value (points out of 100) to gender. There was a wide variation in rough values assigned from 30 to 85 points, leading to an average value of 55 for the three objectives taken together.

Step 2: The average of values assigned to all three objectives was then considered by each group in the context of the whole list of evaluation criteria. The main headings for the technical evaluation of the proposal were (1) responsiveness and technical funding of the proposal, (2) qualifications and experience of key long-term personnel, (3) institutional qualifications and capabilities, (4) gender issues, and (5) past performance. The points assigned to each of the five areas must add to 100. Ideas about the value to be given gender were shared in the whole group at the conclusion of the exercise. There was a general down-grading of the value of gender to between 10 and 15, once placed into a context of the entire list of technical criteria for evaluation of proposals. Because of the experimental nature of the new requirements, some time was devoted to determining how participants saw the exercise and how useful it would be in doing this task in their own Missions.

## Conclusion

Participants were fully engaged in the process of integrating gender into different aspects of planning and implementing environmental programs. The framework and strategies for considering gender in environment programs were useful for reviewing programs on a regional basis. These and the four questions used with the mini case studies were helpful tools the participants can apply in their regular work.

## Economic Growth and Agricultural Development Technical Track
*Prepared by Elaine Zuckerman (WIDTECH Consultant) and Bagie Sherchand (DAI)*

Twelve workshop participants selected the day-long EGAD track. Four participants were from the Africa and Latin America and Caribbean regions, three from Asia and the Near East, and one from Europe and the New Independent States. Two participants were economists, but the other 10 EGAD participants had little exposure to economics. The co-trainers devoted half a day each to linking gender to the macroeconomic policy content of country strategic plans and to the microeconomic content of RFPs, the latter based on an agribusiness example. Each half-day session combined a short talk and dialogue with a realistic case study requiring participant analysis and incorporation of gender considerations. The EGAD track and materials were designed and implemented by Elaine Zuckerman and Bagie Sherchand with assistance from John Pettit of TRG.

### *Macroeconomic Policy and Gender*

*Review of Policy Instruments*

This half-day session began with a short presentation by Elaine Zuckerman on the traditional neglect of and the desirability to incorporate gender analysis into macroeconomic policies, such as:

# The use of gender budgeting techniques to reallocate resources toward the social sectors;

# The ways in which changes in input subsidies (such as fertilizers) affect the productivity of male and female farmers because their initial resource allocations may differ; and

# National budgets that rarely mention gender. Although a few countries have experimented with discrete gender budgets, none have mainstreamed them into national accounts.

Participants had a lively exchange about the possibility of imputing an economic value to women's invisible labor in the reproductive economy. One participant questioned whether it was realistic to expect gender budgets to result in salaries for women's household work and asked who would pay. Another participant responded that the rationale for gender budgets was not to pay for housework but to make transparent women's typically longer work hours than men's and to sensitize governments to consider gender in policymaking and budget allocations.

The session concluded that gains in efficiency and equality were likely to be achieved from macroeconomic policies benefiting women and girls—for example, on education spending and workforce remuneration. Such gender-sensitive government behavior would increase

women's and national productivity and incomes and decrease the state welfare burden, a win-win situation.

*Case Study: Republic of Lekala*

To practice integrating gender into USAID macroeconomic and policy issues contained in a typical country strategy plan, the participants worked on a case study set in the fictitious Republic of Lekala adapted from real USAID country strategic plans. It featured the Lekala economic SOs and IRs. Working in three teams, the participants creatively and thoughtfully revised Lekala's gender-blind IRs to make them gender-sensitive and to prepare gender-sensitive indicators to be included for each sub IR (see box).

## Agriculture Development and Policy

*Economic Growth and Agricultural Development Technical Track*

> **Examples of Gender Indicators for Strategic Objective 3, Improved Capacity of Government and Non-government Entities to Formulate and Implement Policies**
>
> IR3.1.1 calls for "bolstered economic policy capacity of government departments achieved through bilateral exchanges." One indicator could be percent of institutions visited that had the capacity for collecting and analyzing gender-disaggregated data to inform and monitor policy and/or address concerns of women and other disadvantaged groups.
>
> IR3.1.2 calls for "strengthened human resources in economics and policy analysis in key government agencies." Indicators could include (1) number or percent of individuals with capacity for gender analysis and gender budgeting; and (2) number of women and other disadvantaged groups trained and employed in their agencies.

The afternoon session of the EGAD technical track moved into the importance of incorporating gender concerns in project-level activities. Past experience has shown that even when policies and strategies were explicit and well articulated to integrate gender considerations at the macro level, somehow harmonizing or operationalizing gender-based policy directives at the implementation level has proven difficult. In other words, despite strong policy commitment, the disconnect between policy and implementation generally remains.

Actions to integrate gender issues at the project or micro-level have increasingly gained support. There is realization that incorporating gender concerns in project-level implementation tools is an effective approach to ensuring appropriate gender integration at the ground-level. USAID implementation tools for carrying out assistance, such as RFPs and other similar activities and tasks, now have the processes to enforce accountability and to ensure adoption of strategies. In other words, micro-level activities such as RFPs (with its many sub-mechanisms such as performance monitoring plans) provide appropriate channels to translate policy into action.

Using agribusiness as a focus of the exercise, the session led by Bagie Sherchand provided participants with an experiential learning opportunity in how to integrate gender information into USAID instruments and mechanisms such as an RFP.

*Agribusiness and Gender*

Prior to integrating gender considerations into the sample RFP, the participants delved into setting the conceptual stage. Since the RFP dealt with agribusiness, it was important to understand why gender mattered in agribusiness. The participants had a lively debate about the roles, responsibilities, level of participation, and contribution to the agribusiness sector with regard to women. The debate was fueled by discussion about perception of agribusiness, roles of women, level of participation, and contributions differing in different cultures and countries. One participant commented that agribusiness was about business and profits and gaining market-share in the marketplace and thus had little to do with gender. Another counter-argued, saying that since labor was a significant factor of production and therefore profits, gender mattered in agribusiness. She also pointed out that increasingly women are providing the labor in agribusiness firms in many countries, even though the level and degree varied by culture and country. From this discussion, the participants were able to appreciate the importance of the local context when conducting gender analysis.

Integrating gender analysis or issues into an RFP requires two steps: first, to undertake a gender analysis to identify key issues and possible strategies to address them; second, to apply the information gained from that analysis directly to the objectives and/or requirements of the RFP.

For the first exercise, to practice how to conduct gender analysis, the participants were provided with necessary background materials: Xanadu country background summary emphasizing agriculture and small enterprise sectors, Mission SO1 results framework for "increased rural incomes of selected groups," and a fact sheet about women in Xanadu. Working in pairs, participants were asked to identify gender issues and recommend effective strategies to resolve them in ways that would also contribute to achieving that particular Mission's IRs using a gender analysis framework such as shown in Table 2. Participants also defined the result and/or value added that would be achieved as a consequence of undertaking the suggested gender-sensitive approach.

**Table 2: Contributions of Gender Analysis to Results**[2]

| Gender Issues | Approach | Result/Value Added |
|---|---|---|
| As entrepreneurs, women's lack of Collateral (usually defined as land or buildings) is an obstacle to obtaining credit. | Broaden definition of "collateral" to include marketable goods and non-asset based collateral as guarantee to grant loans. | **Women's access to credit improved, more enterprises started, and household income increased.** |
| As employees in agribusiness enterprises, women customarily tend to engage in low skilled, low-paying dead-end jobs. | Imbue enterprise owners/managers the value of training employees and providing job incentives. | **Factor (labor) productivity increased, efficiency of agribusinesses increased.** |

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[2] Adapted from "Increasing program impact through gender analysis," prepared by Andrea Allen, LAC Regional Advisor, WIDStrat Project, for the Nicaragua Mission. Draft, September 1999.

After learning how to conduct gender analysis, the participants moved on to practice incorporating gender into project-level instruments and documents. The second exercise dealt with incorporating gender into an RFP to develop an agribusiness technical assistance center to help smaller producers and rural entrepreneurs. A sample RFP adapted from a real USAID agribusiness RFP was used. Participants were asked, in groups of four, to review the scope of work and decide if and where gender should be integrated into it. The idea of modifying an RFP was to provide the participants with hands-on experience in integrating gender into USAID acquisition tools so those tools demand activities and results that are gender sensitive and gender relevant. For example, the gender element is added, in italics, to the original wording: "Proposal must demonstrate understanding of Xanadu and the Region…and must also address opportunities and problems, *including gender-related constraints faced by different groups*, and demonstrate how it will achieve maximum impact."

## Conclusion

Incorporating gender into macroeconomic policy appears formidable. However, this session showed that applying a gender lens to the general wording of a sub-IR can pinpoint where gender should be taken into account—whether in participation or in the content of training received. Participants practiced how such insight could then be made explicit in RFAs or RFPs.

## Population, Health, and Nutrition
*Prepared by Estelle Quain, Senior Technical Advisor, Office of Population, Health & Nutrition. Debbie Caro, Director of the WIDSTRAT Project, helped in creating the exercises.*

This session consisted of four major sections:

1) Identification of gender issues in PHN;
2) Applying these issues to the design of a PHN program activity;
3) Practice "influencing" others at an SO meeting; and
4) Incorporating gender into a performance monitoring plan.

Training was provided by Estelle Quain and Stephanie Schelk-Zaitsev from TRG. The Interagency Gender Working Group in the PHN Center provided the Emerging Voices on Gender presentation and the case study for the RFA exercise.

## Identifying Gender Issues in PHN: Emerging Voices on Gender

The first session of the day began with the presentation Emerging Voices on Gender, which summarizes the results of interviews carried out by the PHN Interagency Gender Working Group. The summary identifies four key gender perspectives for PHN programs with examples from projects in the field (see box). Participants were asked to reflect on these issues and offer their reactions during the presentation. Next, individually, they applied these perspectives to their own countries, describing how gender relations affect access to and provision of care.

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**Four Gender Perspectives for PHN Programs**

- Taking into consideration differences in power between women and men;
- Changing the power dynamics between women and men;
- Involving men in reproductive health issues and programs; and
- Understanding the cultural roles of sexual and reproductive health behavior.

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Participants then moved into regional groupings and completed a grid showing key gender issues in their region and how these issues could have a positive influence on program results when they are taken into consideration by program designers and implementers. For example, in the MAP program in South Africa, addressing the issue of inadequate partner support could lead to improved results in reducing HIV/AIDS, adolescent pregnancy, and adolescent abortion rates. Focusing on women's limited ability to negotiate sexually would result in women choosing what contraceptive practices they want to follow and in increased condom use, in the age of first sex, and the like. The participants found this exercise challenging but useful in identifying the gender issues in their countries. Key issues raised were partner support, violence against women, and women's limited ability to negotiate safe sexual behaviors.

## Applying Gender Issues to an RFA

The second session began with a brief presentation on an RFA format, highlighting those sections in which gender considerations could be included. A case study was presented as background, and participants were asked to provide examples of program components and selection criteria to include in an RFA for a family planning, safe motherhood, child survival, or HIV/AIDS activity. Small groups listed their components and criteria on flip charts and then reported to the large group. The exercise was most useful in identifying the selection criteria needed to ensure that a gender-sensitive approach would be taken to the program (see box).

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**Sample Criteria for Evaluating an RFA**

- Knowledge of USAID policy and procedures (including gender)
- Information, education, communication/behavior change communication (IEC/BCC), and counseling
- Performance monitoring specialist with demonstrated experience with family planning, reproductive health, and gender
- Short-term social/health economist
- At least one person with demonstrated WID/gender experience, including women's advocacy and health
- Expertise in participatory rural appraisal, customer survey, and feedback techniques and operations research
- Significant developing country experience, with some specific country and regional experience

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*Advocacy for Including Gender Considerations in PHN Programming*

In the third session, participants were placed in small groups to develop a two-part drama depicting an SO team meeting at a Mission. The first part of the role play demonstrated how these meetings often go, where the gender advocate's ideas are not accepted. The second part demonstrated how the advocate successfully convinces her or his colleagues to incorporate gender considerations. Participants were able to use the facilitation and strategic influencing skills they learned on the first day of the workshop.

*Gender in a Performance Monitoring Plan*

The final session of the day briefly reviewed the purpose of a performance monitoring plan and presented a sample strategic framework. Participants were asked to work in small groups on making the IRs and indicators gender sensitive. The worksheet asked them to consider the gender-related obstacles to achieving a particular result, to think about activities that could address these obstacles, and then to revise the indicators as needed. This small group activity brought into play the previous exercises on identification of gender issues and gender-sensitive program components for an RFA. All three groups developed sub-IRs addressing the need to train female providers and to reach out to both women and men in targeting community groups.

*Conclusion*

Incorporating gender into PHN programs is a complex process. We must first clearly define gender and determine how it affects the results of our programs. Once we are clear about how power imbalances—for example, influence women's access to services and quality of the services they receive—we can design programs that address women's (and men's) needs and measure the results of these programs more effectively.

## DAY FOUR

**Presentation Skills**

Facilitators opened this session by asking participants to undertake a written self-evaluation, responding from 5 (always) to 1 (never) to 20 questions such as: "I analyze the values, needs, and constraints of my audience" and "I prepare answers to anticipated questions and practice responding to them." The discussion then moved to understanding one's audience, building on the concepts explored in doing a strategic influencing inventory. The facilitators emphasized that a key point to address with all audiences is "what's in it for me," that is, understanding and preparing for the audience's legitimate interests are keys to a successful presentation. An exercise in profiling an audience was followed by discussion of effective messages. The characteristics and elements of an effective message were described. Using

these concepts, participants planned a message, identifying the kind of audience they would be addressing, the intended outcome of the presentation, and the key messages to be included in the address. In small groups, participants practiced the messages. The handouts provided more material on message development and presentation as a reference for participants when they returned to their Missions.

## USAID Mission Presentations

Many Missions have already made considerable progress in incorporating a gender perspective into their work. Four participants described the approaches or strategies used within their Mission to encourage a gender perspective.

### Zambia

Peggy Chibuye, PHN Advisor, described how an effective program of integrating gender into all aspects of PHN programming can lead to successful programming in that sector as well as improved Mission knowledge and more active attention to gender consideration in other sectors and in the collection of gender disaggregated indicators. She and partner organizations developed innovative information, education, and communication (IEC) approaches in working with communities including the use of mixed groups to discuss reproductive health, STDs, and HIV/AIDS activities. Communication strategies included billboards, television spots, radio programs in English and seven Zambian languages, popular newspapers, and dramatic presentations. Work has been done at the government level, such as having gender included in the in-service training of all health workers and in relevant policy documents. The Mission also works with groups at the community level, especially women's advocacy groups. Social marketing has been done for male and female condoms and through peer education programs. The focused work in PHN has led to an improved Mission understanding of the situation of women in Zambia and the obstacles to their inclusion in development activities. As a result of the effectiveness of these programs and their success, particularly in reaching women, the Mission is beginning to create synergy across partners. In SO2 for education, the PHN partners are working with the Ministry of Education in designing school health and nutrition programs, and with SO1 for the environment are working with the Mfuwe Game Reserve.

### Egypt

Nihad Hassan, WID Officer and Economist, described a successful set of activities to include attention to women in Egypt's developing policy on agriculture. The Agricultural Policy Reform Program (APRP) focuses on aid to agribusinesses, especially for trade. USAID/Cairo asked that APRP look at the effect on women of the current activities in agribusiness. The APRP study focused on five areas: (1) access to land and water resources, especially for married women with no independent legal standing; (2) privatization, especially whether this would negatively affect women; (3) increasing the number of women in agricultural training

and extension services; (4) increasing women's employment in agribusinesses; and (5) how women could form associations and become active decision makers with respect to policy. A study of these issues indicated the need for more attention to women's obstacles and opportunities in the agribusiness sector. This has led to a two-year benchmark for the creation of a women's business center. The benchmark as been agreed to by the Government of Egypt's Ministry of Agriculture and Land Reclamation. Actively involved in the implementation will be business associations, NGOs, Ministries of Labor and Trade and Investment (including funding from each), and the private sector. It is expected that such centers will be developed in all 20 governorates.

## Indonesia

Kusumastuti, Program Development Officer, described the official Gender Committee in the Indonesia Mission. The committee is made up of one member from each SO and supporting officers—for example, the Executive Officer (EXO) and contracting—and is chaired by the Mission Deputy Director. It is responsible for ensuring that SOs address the relevant gender issues and is responsible for collecting WID and gender information. The Gender Committee has been in existence since 1994, but the turnover of direct-hire WID Officers has slowed its growth. The Mission is now recruiting for a full-time FSN WID Officer. Mission activities to encourage attention to gender issues include developing a Mission strategy; brownbag seminars in the Mission on current topics; and an annual award for addressing gender issues, recently won by a male planner for his work in family planning. The Mission is currently supplying BAPPENAS, the Government of Indonesia Planning Agency, with a full-time gender specialist to advise on social safety nets being put in place as a result of the recent fiscal crisis.

## Peru

Miriam Choy, Monitoring and Evaluation Specialist, spoke about the work of an ad hoc Gender Committee that has been meeting since 1995 and on the strategy of using the performance monitoring plan to raise Mission awareness of the relevance of gender. The voluntary group includes representatives from ENV, D&G, health, and cross-sectoral issues. It has no formal schedule, but is called together when necessary. This committee has received three technical assistance missions from the G/WID office. As Monitoring and Evaluation Specialist, Ms. Choy requires that indicators for all projects be sex disaggregated: Who were the customers? Who was providing services? Data are collected as a baseline; analyzed; and used to inform the SO team of differences between men's and women's knowledge, opportunities, obstacles to participation, and the like. In one SO where the team was particularly resistant to gender but did believe in monitoring and evaluation, sharp differences between men's and women's training opportunities were revealed and the program adjusted to increase women's participation.

A fuller description of these presentations and others can be found in Annex 8.

## Regional Roundtables

Each regional group met for an hour and a half to identify key gender issues in their respective regions, to suggest solutions, and to identify regional resources for working on gender issues. There is a marked similarity in a number of the issues identified: violence against women; women's access to resources, particularly land; effects of privatization, globalization, and trade, particularly on women's economic opportunities; and women's advocacy and political participation.

### *Africa and Haiti*

*Key issues*

#   Need to analyze the impact of globalization/trade, conflict, HIV/AIDS on women
#   What are the opportunity costs to women of structural adjustment programs and macroeconomic policy?

*Solutions*

#   Need to incorporate gender up front in strategy and design phase
#   Training required for leadership, program managers, and SO team leaders
#   GID/WID Committee/team approach seems stronger than relying on a single WID Officer

### *Asia/Near East*

Gender issues were identified for economic growth, democracy and governance, environment, and health and education.

*Economic growth issues identified were:*

#   Lack of economic opportunities for women
#   High female illiteracy
#   No access to credit for women-owned micro and small enterprises
#   Low participation/recognition of women in the labor force
#   Labor unions are not gender-sensitive.

*Democracy/governance issues are that:*

#   Women's rights are not yet fully recognized by state and law
#   Primarily women suffer in case of social and political instability
#   Women are insufficiently represented in political institutions
#   Women's low participation in political processes results from low literacy rates.

*Environment issues include:*

\# Women's lack of awareness with regard to environmental issues

\# Environmental (natural resource) degradation affects primarily women (water, wood, fishing).

*Health and education issues are:*

\# Low enrollment of girls (especially in the Near East for primary education)
\# Lack of access to health facilities/services
\# Lack of partner's support for FP/MCH because of lack of awareness.

Approaches were discussed at the policy, institutional, and field levels. At the policy level, key issues are reform of civil laws, enforcement of existing laws, and aggressive promotion of basic education for girls. At the institutional level, key approaches are to strengthen civil society, especially women's advocacy groups; and sensitize decision makers about gender issues and impact. At the field level, approaches should encourage women to provide more voice in community affairs, and provide more information and dissemination activities on gender issues (bringing men on board).

## Europe and Eurasia

*Issues and challenges*

\# Low level of women's participation (official, political)
\# Low level of male participation in civil society;
\# Women's healthcare
\# Domestic violence
\# Housing and land ownership; privatization
\# Jobs-gender discrimination
\# "Gender" male issues: decreased life expectancy; post-conflict trauma/stress; single young men's poverty.

*Solutions*

\# Political, advocacy training for young women (future leaders)

\# Targeted voter and civic education, especially through the media

\# Multiprong approaches to combating and preventing domestic violence:
  – Laws and law enforcement (Rule of Law)
  – Public awareness/education (media)
  – Housing
  – Health care

\# Focused attention on engaging young men/students in NGO programs and activities

\# Land code drafting/reform and land privatization should be subject to gender analysis; women as owners, tenants, residents, landladies, etc.

\# Gender awareness of economic policy development

\# Increased public awareness of alternative birth control methods

\# Raise awareness of men's health issues—starting with targeted HIV/AIDS/STD assistance (inclusive of psychosocial health issues)

\# Accurate poverty assessment
  - Wealth and income
  - Gender disparities

\# Gender focus for labor code reforms, including maternity leaves

\# Gender focus for social safety net reforms: pensions, workers' compensation, unemployment, disability, "family benefits," childcare/creches.

## *Latin America/Caribbean*

Regional gender/WID issues identified were domestic violence, alcoholism, political participation, lack of opportunity, and the invisibility of WID and gender, contributing to poverty.

*Strategies discussed* were to:

\# Develop and foster alliances with men;

\# Build on the strengths that women already have;

\# Integrate gender into programs versus always treating women separately;

\# Demonstrate situations with facts;

\# Encourage policy level and donor coordination effort;

\# Work with NGOs that include both men and women in programs in poverty alleviation and economic growth;

\# Support women and microenterprise and workshops on business; and

\#  Give priority to where women are.

## Summary of Evaluations

Participants self-rated their change in knowledge related to the workshop objectives and usefulness of the sessions at an intermediate to high level (the objective was met very successfully). The four all-day technical sessions were rated the highest.

The written comments provide a much richer understanding of how the participants perceived the workshop.

- There is a wide range of levels of satisfaction demonstrated through the comments. Those with more experience in gender, USAID strategic processes, and facilitation/strategic influencing were frustrated with the basic approach of much of the workshop and with the time spent on facilitation and strategic influencing. Those newer to these issues and techniques were happy with the same. The conclusion is that next time concurrent sessions might be offered for different levels of ability among participants.

- Out of 24 responses, 22 stated that the trainers were well prepared, accessible, and knowledgeable.

- Out of 25, 21 were energized by the interactive approach of the workshop.

- Many of the participants' comments stated they felt rushed and wanted *much* more time to share experiences from Missions and within regions; and they wanted fewer exercises and more time to do the ones they did.

- A number wanted to hear more from G/WID representatives and USAID/Washington colleagues and to see their faces on-site and at the reception. There is a clear desire for much more frequent communication to the field from G/WID about new issues, lessons learned, best practices, and guidance. Several people suggested (again, this was also mentioned during the appreciation/closing part of the workshop) that a one-page flyer with G/WID names, faces, contact information, and specialties be prepared and disseminated to WID officers.

- Follow-up suggestions focused on more regionally oriented, targeted workshops to entice SO team leaders and non-WID officers to attend and better communications between Washington and the field and between Missions.

- Specific comments were made on each technical session. Although some participants complained about the lack of time for the exercises, most appreciated the practical USAID-oriented and sector-oriented materials.

The D&G session "provided a more comprehensive concept and process for including gender in D&G." The scope of work exercise was a "a big help [for] future design of SOWs,

especially the 'optimal strategy' approach," "very exact and illustrative." The results framework "provided us with different 'explicit' and 'implicit' ways of including gender perspectives."

EGAD participants stated that the lectures "were helpful." The exercise on integrating gender into an EGAD RFP was "useful, provided an almost real life exercise for future work in integrating RFPs."

Participants in the Environment session appreciated the "handy strategies and framework provided." Overall, they found the session "very useful." "Formulating the case [of integrating gender into RFPs] was a bit difficult, but very useful."

The PHN session helped clarify issues and look at issues faced worldwide. The exercise on integrating gender into a PHN performance monitoring plan was "a very helpful review," "clear and easy."

**ANNEX 1**

**GENDER PLAN OF ACTION**

# STATEMENT BY J. BRIAN ATWOOD
# ADMINISTRATOR, U.S. AGENCY FOR INTERNATIONAL DEVELOPMENT

## GENDER PLAN OF ACTION
## MARCH 12, 1996

More than twenty years ago, the U.S. Agency for International Development (USAID) officially recognized the critical role of women in development by establishing an Office of Women in Development. This was only a first step in a long journey to fully address gender issues in USAID programs.

USAID has played a leadership role in the donor community in focusing on the crucial role of women in advancing social and economic development since the early 1970s. During the last several years, USAID has made significant increases in the level of funding directed to programs that directly benefit women and girls. The agency has also launched major new initiatives in the areas of reproductive health for women, girls education, women and microenterprise, and women's political participation and legal rights.

These represent significant accomplishments. But perhaps the greatest accomplishment is the increasing realization that for development to be effective, programs must pay attention to the central role of women in the economic and social advancement of a nation.

But does the agency still miss opportunities because we have not designed and implemented our activities in light of the different roles and needs of women and men in development? Undoubtedly.

We must make the most of our opportunities to achieve lasting results:

\#   Our efforts to strengthen democratic institutions must always consider the obstacles that women face as they attempt to gain access to their own political and legal systems;

\#   Our efforts to improve incomes must regularly consider whether the new earnings will be controlled by mothers who—research has found—who are more likely than fathers to spend it on children's nutrition; and,

\#   USAID's credit services and training programs must always make sure that office hours and course schedules take into account the different time constraints that men and women face.

To make sure that USAID programs continue to achieve their best results, we will make some changes in the way we do business. We will ensure that our systems facilitate and encourage

attention to gender issues, and we will strengthen our technical capacity to address women's issues as development issues.

Some actions can be taken right away—and we are taking these actions. This year, the Agency Sector Reviews, in which we examine Agency performance against each of its objectives, will focus particularly on gender issues. We will modify the Agency's Strategic Framework to reflect the key role of gender considerations in the achievement of USAID goals. We have appointed a senior policy advisor on Women in Development, in the Bureau of Policy Planning Coordination, to reinforce the integration of gender issues into Agency policies across sectors. We are implementing a Women in Development fellows program to help build our technical expertise. Several other key measures, noted in this Gender Plan of Action, will soon be underway.

Equally important, we explore additional measures that will ensure continued attention to gender issues in USAID—measures that might be taken in the areas of data collection and analysis, personnel recruitment, training and performance, or procurement systems.

To this end, I have charged the Agency's Counselor to draw on your expertise, and to work closely with the staff who will ultimately be held responsible for implementing such actions. While there may be some options that we will not be able to pursue for lack of resources, I am confident that actions we take will yield results in program performance. I look forward to receiving the results of the Counselor's work by May 31.

Through attention to gender issues, our development assistance programs will be more equitable, more effective, and—ultimately—more sustainable. We can all do a better job of making this come to pass.

**USAID GENDER PLAN OF ACTION**
**MARCH 1996**

For more than 20 years, USAID has worked to ensure the integration of gender considerations into its programs. The Agency is continuing to foster the institutional changes needed to support women in development. Having reviewed a variety of options for "institutionalizing" attention to issues concerning women in development, USAID has developed this Gender Plan of Action.

In order to build commitment to consideration of gender issues as key development issues, USAID will:

# Modify the Agency's strategic framework—objectives, approaches and indicators, as appropriate—to reflect under each strategic objective the key role of women in development;

# Update and strengthen the Agency's Women in Development Policy Paper; and,

# Ensure that gender considerations are incorporated into the key strategic framework forthcoming implementation guidance.

In order to build capacity to address women in development issues in all Agency programs, USAID will:

# Appoint a senior policy advisor on women in development in the Policy Planning Coordination Bureau to reinforce the integration of gender issues into Agency policies across sectors;

# Implement a women in development fellows program to help build a technical cadre to support the integration of gender issues into development programs, and to allow for the assignment of advisors in all USAID Bureaus;

# Develop guidance regarding the authority, mandate, and technical qualifications of women in development officers and coordinators throughout the Agency; and

# Incorporate gender considerations into Agency guidance on re-engineering and re-engineering training that encompasses all functions, including monitoring and evaluation; CDIE training in the development of indicators; new entry training; and sectoral training.

In order to build incentives for the consideration of gender issues, USAID will:

# Establish a women in development Performance Fund to award supplementary program funds to Agency programs that best address gender issues as integral components of effective development assistance.

Finally, the Agency's Counselor will:

\# Report to the Administrator regarding the feasibility of actions such as addressing program performance on women in development via the Agency's system for evaluating the performance of personnel; improving direct-hire staff expertise in women in development through the Agency's system of technical backstops and/or training of personnel; improving USAID's collection and use of sex disaggregated indicators of results; and, providing incentives for improved women in development expertise among contractors and collaborators via USAID's procurement procedures.

\# Develop and report to the Administrator on implementation plans for those actions deemed necessary and feasible.

\# Monitor the overall implementation of the Gender Plan of Action, including such additional feasible actions as are agreed.

In undertaking this charge, the Counselor will consult with, and receive the strong support of USAID central and regional Bureaus. The Counselor will also consult with the USAID partner community—nongovernmental organizations (and, in particular, the Advisory Committee on Voluntary Foreign Aid), universities, and consulting firms. The Counselor will report to the Administrator as follows:

\# By May 31, 1996, provide recommendations regarding the feasibility of various options for further building USAID's ability to incorporate women in development considerations throughout its programs.

\# By July 31, 1996, provide implementation plans for feasible actions approved by the Administrator.

\# By October 31, 1996, report on the overall implementation of the Gender Action Plan. It is expected that, at this point, the Plan in its entirety will be substantially implemented.

## USAID GENDER PLAN OF ACTION: ADDITIONAL MEASURES
## JUNE 12, 1996

\# Position descriptions for Agency Program Officers will be revised to specifically include responsibility for addressing gender issues.

\# Experience and understanding of women in development issues will be taken into consideration in recruitment for Program Officers and appropriate technical officers.

\# Guidance concerning the critical need to address gender issues in development will be issued to the staff and committees that rate the performance of both civil service and foreign service personnel, and to the boards that select foreign service personnel for promotion.

\# USAID competitive assistance guidelines will include a requirement that applicants for assistance demonstrate their abilities to address gender/WID issues. In contracting, a methodology will be developed for including a technical requirement regarding gender issues in statements of work for RFPs.

\# Indicators of program impact on the social and economic status of women will be included in the "menu" of indicators being developed for USAID missions. In addition, the Agency Strategic Framework will be supported by sex disaggregated results indicators and the collection and analysis of sex disaggregated data, as appropriate.

\# Language will be included in the Automated Directives System specifying that strategic planning and results reporting documents should indicate how gender considerations are being addressed.

\# Each full mission will review and revise its Mission Orders as necessary in order to apply to its directives the forthcoming revision of the Agency's WID Policy.

**ANNEX 2**

**CURRENT AGENCY GUIDANCE**
**WITH RESPECT TO GENDER INTEGRATION**

# CURRENT AGENCY GUIDANCE
# WITH RESPECT TO GENDER INTEGRATION

During 1999, a number of actions were taken by USAID to firmly incorporate consideration of gender issues into its key instruments for contracts, grants, and cooperative agreements through the Automatic Directive Service (ADS). The actions taken reflect the commitments made in the AID Women in Development Policy Paper of 1982 and the Gender Plan of Action and Additional Measures, March and June 1996. Copies of these papers are provided in the Gender reference packet. The language of the guidance and notices listed below makes reference specifically to grants and cooperative agreements (ADS 303), and states that a policy to require gender considerations be integrated into competitive acquisitions will be similar to the policy in ADS 303 (See CIB 99-13).

## ADS 303: GRANTS AND COOPERATIVE AGREEMENTS, MARCH 1999

The modification of ADS 303 to draw attention to gender is the first of the formal changes anticipated by the Gender Plan of Action. This modification achieves the following:

\# Explicitly states that gender issues should be addressed in all USAID funded activities with reference to the 1982 WID Policy Statement. (303.5.5b)

\# If the SO/RP team decides gender is not to be incorporated, they must document their decision in writing and in bids over $250,000 refer the decision to the Mission Director or Assistant Administrator for his/her approval. (303.5.5b, para.4)

\# Where gender issues are to be incorporated:

C The RFA or Annual Program Statements must state explicitly the requirements for including gender issues. (303.5.5b, para. 5)
C SOTs should state specific evaluation criteria for evaluating the applicant's plan to incorporate gender issues, consulting, to the extent necessary, with the Bureau for Global Programs, Office of Women in Development (G/WID) for guidance on structuring the criteria to evaluate the plan's **positive impacts on the socioeconomic status of women, any differential impacts on men and women, and methods for measuring these impacts.** (303.5.5b, para. 5)
C The Cognizant Technical Officer shall coordinate as necessary with G/WID in evaluating applications against the criterion relating to gender issues. (303.5.5c, para. 3)

## CONTRACT INFORMATION BULLETIN 99-13, JUNE, 25, 1999

This memorandum goes to contract officers and negotiators to notify them of **pending changes** in USAID Guidance. The bulletin makes reference to the Gender Plan of Action and Additional Measures. It states

# When the Statement of Work (SOW) for a contract solicitation identifies gender issues or considerations as part of its requirements, the Contracting Officer must include an **evaluation criterion** to address this requirement.

# The Contracting Officer, with the cooperation of the SOT and G/WID as needed, will **tailor the wording of the criterion and weigh it to appropriately reflect the relative significance of gender issues to the overall requirement**.

# That G/WID is currently seeking to institute a policy to require the integration of gender considerations at the SOW stage in competitive acquisitions. This policy will be similar to that stated in 303.

## USAID/GENERAL NOTICE, SEPTEMBER 14, 1999 AND
## ADS 202, MANAGING FOR RESULTS: ACHIEVING

The general notice alerts USAID and contractors that ADS 202 has been revised to integrate gender and summarizes the changes in ADS 202 which guide competitive bidding. The main points are:

# Gender integration is defined in the ADS Glossary.

# "Gender integration is a *focus on the participation of and benefits to each gender* in development programs, while *promoting women's leadership of and equality in program and organizational structures*."

# The definition of customer is expanded. To include age, gender and level of physical and/or mental ability.

# SOTs have responsibility to integrate gender considerations into SOWs for RFAs and Annual Program Statements.

# SOTs draft language for evaluation criterion.

# If the SOT believes gender is not relevant, it must draft a short statement of justification for the signature of the Office Director or his/her equivalent.

# Contracting Officers return to the SOT any request for a competitive A&A award that is not in compliance with this procedure.

**POSTSCRIPT:**
**USAID/GENERAL NOTICE, JANUARY 27, 2000**
**ADS 302, USAID DIRECT CONTRACTING**

This general notice alerts USAID and contractors to a number of changes in ADS 302. Specific reference is given to the addition of new sections, 302.5.14 and E302.5.14, Incorporating Gender Considerations into Evaluation Criteria for Competitive Solicitations. *The text essentially implements contracting policies and procedures to correspond to ADS 202.5.5c*, Integrating Gender Considerations into Program Funded Activities. The main points are

\#  that contracting officers must assure compliance by

 C  Inclusion of an *appropriately weighted technical evaluation criterion addressing gender considerations in all competitive solicitations;* or

 C  Returning requests for a competitive contract to the SOT if it does not include either a draft evaluation criterion or a short statement of justification as to why gender is not an appropriate consideration for the activity.

**ANNEX 3**

**PARTICIPANT INFORMATION**

# PARTICIPANT INFORMATION

| Participant Name | Mission | E-mail Address |
|---|---|---|
| **ASIA/NEAR EAST** | | |
| **Rageh**, Nihad Hassan | Egypt | nhassan@usaid.gov |
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| **AFRICA** | | |
| **Graciana**, Ana | Angola | |
| **Msibi**, Valencia | RCSA, Gaborone | vmsibi@usaid.gov |
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| **Mukira**, Loise H. | REDSO/ESA | lmukira@usaid.gov |
| **Muhato**, Wanjiku | REDSO/ESA | wmuhato@usaid.gov |
| **Oldwine**, Eilene | South Africa | eilene_oldwine@hotmail.com |
| **Subedar**, Munira Bunny | South Africa | mbunny@usaid.gov |
| **Mbuya**, Hedwiga S. | Tanzania | hmbuya@usaid.gov |
| **Chibuye**, Peggy S. | Zambia | pchibuye@usaid.gov |
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| **Loukovenko**, Inna | Russia | lloukovenko@usaid.gov |
| **Rosenberg**, Ruth | Armenia | Rrosenberg@usaid.gov |

**ANNEX 4**

**PROGRAM**

# PROGRAM

| Gender and Results Workshop Agenda | | | |
|---|---|---|---|
| **Tuesday** | **Wednesday** | **Thursday** | **Friday** |
| 8:30  Welcome<br><br>9:00  Participant Intros<br>Warm up<br><br>10:15 Review Objectives, Schedule and Learning Agreements<br><br>10:25 BREAK<br><br>10:40 Review Cont'd.<br><br>10:55 Gender Concepts and WID | 8:30 Open the Day<br><br>8:45  parallel sessions:<br>D&G<br>ENV | 8:30 Open the Day<br><br>8:45  parallel sessions:<br>D&G<br>EGAD<br>PHN | 8:30 Open the Day<br><br>8:45 Mission Presentation<br><br>9:45  Message Development - Lecturette<br><br>10:15 Break<br><br>10:30 Message Development<br><br>11:45 Regional Roundtable - through lunch |
| **Lunch 12:00 – 1:30** | **12:30 – 1:30** | **12:30 – 1:30** | **12:30-1:15** |
| 1:30  Facilitation Tools<br><br>2:35  Power<br><br>3:15  Break<br><br>3:30 Strategic Influencing<br><br>5:20 Reflection/Plan<br><br>5:30 group photo and end | 1:30 Continuation of morning sessions<br><br>4:00 Reflection/Planning<br><br>4:30 Individual Counseling<br><br>5:30 end | 1:30 Continuation of morning sessions<br><br>4:00 Reflection/Plan<br><br>4:30 Individual Counseling<br><br>5:30 end<br><br><br>Reception<br>6:00 – 8:00<br>J.W. Marriott<br>1331 Pennsylvania<br>Salon G<br>(Enter on 14th St.) | 1:15 Report out from Regional Round Tables<br><br>2:00  Message Presentation Practice Activity<br><br>3:30 Break<br><br>3:45 Application Planning<br><br>4:10 Appreciation, Closing Comments, & Evaluation |

# ANNEX 5

# TECHNICAL ASSISTANCE PROVIDED

# TECHNICAL ASSISTANCE PROVIDED

| | Person | Material | TA Provider |
|---|---|---|---|
| **Democracy and Governance** | | | |
| 1 | Carol Becker, Guyana | Help specifically needed for cooperative agreement IRs and activities related to: women's empowerment, institutional strengthening of NGOs working in this area. Need good, measurable indicators on this. | Andrea Allen, WIDStrat D&G Specialist |
| 2 | Gartini Isa, Indonesia | Interested in how to help partner NGOs/grantees determine gender of beneficiaries, need examples of indicators to measure grantee performance. Bringing indicator list they have used. | Marcia Greenberg, WIDTECH D&G Specialist Susan Jay, G/D&G |
| 3 | Inna Loukovenko, Russia | Help in planning a new activity, a small grants competition, and developing a performance monitoring plan under the Support to Women's Crisis Centers Program. Also we are thinking over and designing project to supplement other donors' activities in preventing or addressing domestic violence. | Cate Johnson, G/WID D&G Specialist |
| 4 | Wanjiku Muhato, REDSO/ESA | D&G Activity Design | Marcia Greenberg, WIDTECH D&G Specialist |
| 5 | Sofia Villalba, Ecuador | Activity Design Document and the Monitoring Plan for the new SO3 "More effective and Fair Criminal Justice System". Have framework and indicators but not gender yet. | Marcia Greenberg, WIDTECH D&G Specialist |
| **Economic Growth and Agricultural Development** | | | |
| 6 | Sonia Aranibar, Bolivia | Alternative Development program (from coca production) – sustainable crop alternatives. Help in determining women's role in production and marketing. | Andrea Allen, WIDStrat D&G Specialist, with Miriam Choy |
| 7 | Miriam Choy, Peru | RFP on Alternative Development | Andrea Allen, WIDStrat D&G Specialist, with Sonia Aranibar |
| 8 | Kusumastuti, Indonesia | How to integrate gender into strategy for SO on Public Sector Economic Policy Reform | Bagie Scherchand, DAI, Economist |
| **Environment** | | | |
| 9 | Maricela Ramirez, Dominican Republic | SO merging EGAD, D&G, ENV, and education. Need help with SO agreement and PMP. Could use TA to 1) help develop skills necessary for preparation of gender-sensitive CSPs, 2) enhance skills to collect, analyze and report on gender-related data, 3) enhance skills to evaluate impact of Mission projects on women | Elaine Zuckerman, WIDTECH Consultant, Economist; Mary Rojas, WIDTECH Environment Specialist; Kara Page, WIDTECH Consultant, Environment |
| 10 | Salwa Wahba, Egypt | No materials but interested in assistance. Gender not currently in (environment?) program. | David Gambill, WIDStrat Environment Specialist |

|  | Person | Material | TA Provider |
|---|---|---|---|
| **Population, Health, and Nutrition** | | | |
| 11 | Mona Bawab, Egypt | I would like some guidance on how to emphasize the importance of gender integration into our PHN strategy in order to better address the women/gender issue." | Mihal Avni, G/PHN |
| 12 | Kristin Cooney, Haiti | Results Package and PMP (bringing) | Debbie Caro, WIDStrat Project Director, PHN Gender Working Group |

**ANNEX 6**

**TECHNICAL MATERIALS PROVIDED TO PARTICIPANTS: BIBLIOGRAPHY**

# TECHNICAL MATERIALS PROVIDED TO PARTICIPANTS: BIBLIOGRAPHY

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| --- |

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|---|

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**ANNEX 7**

**KEY GENDER DEFINITIONS**

# KEY GENDER DEFINITIONS

**WOMEN IN DEVELOPMENT (WID)**. Research and development activities, that focus on women's roles, improvement in their human capital, programs specifically for women, and women's inclusion in "gender neutral" programs.*

**GENDER.** Social construct of the roles of both men and women. Focuses on the relations between men and women, often describing the relations in terms of power and the relationship with inequality and subordination between men and women. Often looks at age as well as sex.

**GENDER ANALYSIS.** A systematic approach to understanding the roles, opportunities, and constraints of men and women, including understanding the relations between men and women. Provides information for identifying who should be included in or will be impacted (positively or negatively) by a development activity. It covers questions concerning the division of labor, the relative access to or control by men and women of the resources for and benefits of production.

**GENDER INTEGRATION.** Gender integration is a focus on the participation of and benefits to each gender in development programs, while promoting women's leadership of and equality in program and organizational structures. (Ref. USAID ADS Glossary)

**CUSTOMER.** Individuals of every age, gender, and level of physical and/or mental ability or organizations that receive USAID services or products, benefit from USAID programs or that are affected by USAID actions. (Ref. USAID ADS Glossary)

*This definition of women in development is the customary one used in discussions of gender. The USAID Office of Women in Development goes beyond this definition focusing specifically on gender mainstreaming or gender integration into on-going sector-specific strategic objectives, results packages, and activities.

## GENDER ISSUES: POINTS FOR DISCUSSION

1. Any majority has the power to use its culture to define norms and standards for competency and success.

2. Societies and the organizations within them that are dominated by a majority often develop informal patterns and operating norms that may be invisible to or negative towards those who are different from the majority.

3. There are many differences that influence opportunities and relationships; gender is one along with race, age, and other variables.

4. Similarly, women and men are not homogenous groups and women's and men's situations vary according to caste, class, rural or urban experience, etc.

5. Sometimes women in the public domain, fewer in number, face certain dilemmas that men, in the majority, may not, such as navigating around friendships, being heard, and giving and receiving feedback.

6. Often, being a woman leader can be difficult and lonely. Because there are so few women, they may have fewer natural allies. *This statement received the most discussion as participants pointed out that in some cases, women leaders can become part of an elite that no longer is in contact with or works on behalf of other, poorer women.*

7. Gender-based constraints such as lack of mastery of a dominant language, time availability, restricted mobility, lower level of education, different ways of gaining knowledge, and a lack of formal role in the public domain contribute to the invisibility of women and their reduced opportunities.

8. A gender lens helps planners identify key differences and similarities between men and women. Such variables include access to and control over resources and benefits from those resources, sexual division of labor, women's and men's different knowledge, and gender relations of power.

9. Applying a gender lens can enhance results in several ways: (1) by identifying men's and women's respective roles, knowledge, opportunities, and constraints; (2) by drawing attention to women's needs and contributions that may have been ignored and to obstacles that need to be overcome; and (3) by applying the same questions of difference to other groups as well, in order to better know and serve diverse customers.

**ANNEX 8**

**FINDINGS FROM SELF-ASSESSMENTS:
MISSION GENDER INTEGRATION PRACTICES**

# FINDINGS FROM SELF-ASSESSMENTS: MISSION GENDER INTEGRATION PRACTICES

## KARA PAGE

## A. "BEST PRACTICES" IN KEY THEME AREAS

## Introduction

In reviewing the 25 self-assessment reports submitted, several important themes have been identified. This report provides an in-depth look at several key themes and pulls together "case studies" from the set of assessments to illustrate the "best practices" found in addressing those themes.

## Best Practice Case Studies

*Theme 1. Cross-cutting Strategies. A number of Missions have begun attempting to integrate gender issues throughout their programs. This section looks at several examples of how it's being done.*

## *Indonesia Case Study*

USAID/Indonesia has established the following processes to support gender integration throughout its programs:

\# A WID Committee – The Mission Deputy Director chairs the Committee. Members of the WID Committee represent each SO in the Mission, and they are responsible for ensuring that gender concerns are addressed in activities of their SOs. In addition, the members are responsible for compiling WID-related material for use by the committee and other SOs.

\# Gender concerns are systematically addressed in the Mission R4 through gender analysis and disaggregated data presentation.

\# A Mission Order on responsibility and policy of WID Officer (Dec. 20, 1994) lays out his/her specific responsibility. The WID Officer is required to develop and monitor an annual WID Action Plan for the Mission, in collaboration with each SO team.

\# An annual Mission Gender Award. Last year the award went to a male staff member who succeeded in achieving the high participation of women in his program, which involved training to reduce use of pesticides in rice plantation.

\# The WID officer is a USDH and also serves as a program development specialist in Environment Team. In order to reduce the lags resulting from the turnover of direct hires, a new, full-time (FSN) WID officer will be hired as well.

\# The Mission has funded WID-specific and gender-oriented activities in various sectors, including: a Social Safety Net Advisor for ministerial-level planning, the Indonesian Women's Coalition for Justice and Democracy Congress, women's and gender-sensitive NGOs, etc.

\# Recent RFPs coming out of the Mission have addressed USAID guidance on gender integration directly and requested respondents to incorporate this in their proposals.

For more information, contact: Isa Gartini, E-mail: igartini@usaid.gov; Kusumastuti, E-mail: Kusumastuti@usaid.gov; Juliana Sahulata, E-mail: jsahulata@usaid.gov

## *Morocco Case Study*

USAID/Morocco is developing two themes—gender issues and private-public partnerships—as crosscutting components of the 1999-2005 Strategy. These themes will be emphasized across all sectors of engagement during the strategy period. Morocco's portfolio consists of economic growth, environment, health, and education.

The cross-cutting theme team is just beginning to get organized, but has developed draft planning materials including a results framework (which will include themes besides gender), a customer service plan, and a performance monitoring plan. Each SO and Director/Program Office will be represented. The responsibilities of the team will include: decision-making on Mission gender issues, monitoring gender-related activities and impact, indicators, and support activities. The initiative will directly impact the results of programs in health, education, income generation, water management and equity.

In Morocco, women can vote, have full legal rights over their property, can own businesses, and can engage in private enterprise. However, these rights are often contradicted by the Code of Personal Status (Moudawana) which regulates the status of women in the family and is based on religious doctrine. Rural women, in particular, lack adequate access to health, education, small credit, and legal services. Certainly, with the confusion posed by the existence of both the Moudawana laws and the constitutional laws applicable to women, women's control over their own property and income remains questionable.

Regarding such issues, USAID/Morocco will target opportunities to increase the participation of women in decision-making processes, and to increase their access to resources for their development. The targeted areas will include: public life, the economy, legal arena, labor markets, education, health, environmental management, and private sector development.

**Activity-level Synergies Among Strategic Objectives**

The development of a number of synergistic activities will underscore both the crosscutting themes and the developmental objectives of individual SOs. In most cases, this will involve targeting of the same customer groups at the activity level, similar to the manner in which inter-ministerial working groups and the regional councils will target overlapping customer groups in the rural, urban and peri-urban zones of the regions. Co-implementation of activities will be sought as it will provide a powerful development approach, and thus, USAID programs will have important demonstration effects.

Additional information/update from Morocco team members here.

Contact:  Tina Dooley-Jones, E-mail:  tdooley-jones@usaid.gov; Abderrahim Bouazza, E-mail:  abouazza@usaid.gov

## *Egypt Case Study*

USAID/Egypt is preparing a ten-year strategic plan to define priorities for guiding the program for the period FY 2000 - FY 2009. The Mission has identified the following:

\#   program goal

\#   five preliminary strategic objectives:

- C   Job creation, economic growth and productivity;
- C   Human capacity building and education;
- C   Democracy and governance;
- C   Population, health and nutrition; and
- C   Environment and natural resources

\#   three crosscutting themes:
- C   poverty/equity/geographical disparities,
- C   public/private partnerships,
- C   gender

In this regard, gender is being taken into consideration as an indicator to measure results for the five strategy objectives/clusters. For example, the Job Creation cluster has considered the following to be the indicators for results:

\#   the total number of private sector jobs, disaggregated <u>by gender</u>,
\#   the number of new private sector jobs created annually disaggregated <u>by gender</u>,
\#   the proportion of changes in highly productive sectors and sub-sectors to the change in national employment.

Contact:  Nihad Hassan Rageh, E-mail: nhassan@usaid.gov

*Theme 2. Mission-Donor Gender Committees. (See also Guyana, Indonesia, and Peru.)*

## Haiti Case Study

USAID/Haiti has for several years supported an increasingly cross-sectoral emphasis on women's roles in development in Haiti. One aspect of this emphasis is leadership of a mixed, USAID-Donor-NGO Gender Committee. Another is establishment of a new Women's Empowerment Results Package.

The Gender Committee includes both USAID and non-USAID members. Within USAID, there is a PSC from D&G; FSNs from both ED and EGAD; and direct hires, PSCs, and FSNs from PHN. USAID members work within their sectors on girls' education, microcredit programs, microenterprise programs, justice programs, women's and men's reproductive health programs, etc. Other committee members come from local and international institutions with programs and projects affecting women. They are not necessarily (and in fact most are not) USAID-funded. Other donors participate in the group (UNICEF, UNFPA, IDB, etc.), as does the Director-General of the Ministry of Women's Affairs and Rights.

This group meets on a monthly basis, takes field trips together, plans presentations together, arranges mutually beneficial training together, etc. It helped the Mission WID officer develop women's empowerment indicators and provided input to the women's empowerment RP.

The women's empowerment results package is an effort to address the lagging status of women in Haiti and the crucial role they play in development across the board. Additional Mission activities include its success in developing good, gender-sensitive microcredit/entrepreneur and reproductive health programs. The Mission funded the Haitian Vital Voices effort; some of the First Lady's preparations for the next First Ladies' conference that will be held in Haiti; and, through Save the Children, women's literacy efforts. They expect to expand on some of these areas in the coming year. Overall in its work ethic, the Mission supports "very active teamwork," which makes incorporation of gender issues into the final products easier.

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## Bolivia Case Study

Bolivia has a strong donor coordination system. The gender donor group is one of the oldest and more active groups. It meets regularly to exchange information and discuss gender related programs and proposals. It also organizes training courses for WID/gender officials and provides support to government and non-government organizations dealing with gender matters.

The group's successes include lobbying the government for changes in rules of participation. Previously, despite their presence on the political scene, women had difficulty in being heard because they were always scheduled to go *last*. Now those rules have been changed:  now the

rules say you have to *alternate* between women and men speakers, so women are finally being heard.

Within the Mission there is also an ad-hoc gender support group from various technical and support offices.

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*Theme 3. Monitoring and Evaluation*

## Peru Case Study: Using Gender-disaggregated Performance Monitoring Data to Identify Gaps and Improve Performance in Programs

**The Context:** In USAID/Peru, there have been increasing changes in support of gender integration over the last five years. Since 1995 the Mission senior management has shown increasing support to gender, and in that same year G/WID helped re-establish a gender committee to see that relevant issues were addressed in the Mission's new strategic objectives. The Mission has invited G/WID in three times more since then; to help in strategic planning, in drafting a new Mission Order and Gender Action Plan (review and approval still pending), and in implementing gender analysis for an environmental awareness survey.

The Mission has made local investments in gender issues as well. For example, in 1998, the Mission hosted a WID/fellow; formed an ad-hoc Gender Committee; identified a "gender-advocate" in each SO Team; and carried out brief workshops and discussions on gender analysis for staff and counterparts. In addition, the Mission has funded participation of Peruvian congresswomen to the Vital Voices of the Americas conference and supported the implementation of the first survey on domestic violence prevalence. The Mission supports numerous gender-sensitive activities. Others include financing through the poverty reduction program for hundreds of women's organizations for village banking and small productive activities; and funding through a Small Activities Fund for select community initiatives from women's groups.

There also exists a supportive environment within donor community; Peru has a very active donors' gender working group which meets every other month and interacts with the Government's Ministry of Women as a common voice from the international community on gender issues. All this has added to a long-term sense of change and improvement in the Mission's gender-related efforts.

**Using the Data:** In the day-to-day work of the Mission, however, a primary factor in the Mission's successes in integrating gender seems to be the common-sense focus on improving results taken by the specialist. In this role, she has required gender-disaggregated performance monitoring data for all programs as called for in USAID guidance. Her analysis of the data is used by the Mission's SO teams to identify ways in which integrating gender can help them improve performance.

The Peru Mission currently supports six SOs: democracy, poverty reduction, health and population, environmental alternative development, and girls' education. Officially, each SO team has the responsibility to ensure that gender is integrated into their strategies and activities. However, not all teams have fully integrated gender in their work. In her M&E role, the gender advisor often oversees the on-going process of monitoring and reporting, particularly during activity design, data collection processes, and the development of performance plans, analyses, and reporting (R4). Over time, this fortuitous combination of gender and monitoring in one person's responsibilities have meshed, with positive results. In one case in particular, the program has increased its success many times over due to the careful support of the gender advisor.

In Peru's microenterprise/small producers' project (MSP), the process of change took 3 years. The first year, the advisor worked with the team's monitoring staff to set baselines with gender disaggregated data. The second year, they collected performance data and analyzed the results; and were surprised to find that roughly 70 percent of their target audience was women, and that there existed serious barriers to women's participation. The third year, they planned activities to address these gender constraints. Now, the MSP team is developing specialized training materials for rural women, who are mostly illiterate and is taking steps to ensure that both men and women (farmers and their spouses) receive production skills training. MSP is trying to promote marketable items that are almost entirely or partially produced by women. The MSP counterpart-monitoring specialist is now a gender advocate, and is helping integrate gender within MSP and with MSP sub-grantees. And the measurable results achieved by the program have begun to improve.

As a rule, now, if gender is not considered during the design, Peru's gender advisor notes that the first step is to collect gender disaggregated data for performance baseline and monitoring. In the worst cases, partners/activity managers do not see the need to do so, or consider it a costly effort. However, they usually comply because it is a USAID requirement – thus a factor in this success is having the *guidance* from Washington to support field work in gender. The second step is to analyze data from a gender perspective and discuss results, compare that to national trends, factors, etc. Once partners/teams recognize that aggregated data masks gender (and geographical) differences and the importance of understanding each group for the achievement of a determined result, the task for achieving gender integration is significantly facilitated.

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*Theme 4. Sector-Specific Gender Integration*

## Egypt Case Study: A Success Story in Economic Growth and Agricultural Development

With the commitment to develop and strengthen private sector institutions, and aiming to sustain the export-oriented horticulture field in Egypt, USAID supported the formation of the Horticultural Export Improvement Association (HEIA) under the Agricultural Technology Utilization and Transfer (ATUT) project. By coincidence, the two members who are doing

the business of sea and airfreight for horticulture field were women. A Women's Committee was formed, under HEIA to work on women/gender issues such as ownership, leadership, management, female laborhood, training, working conditions, constraints to productivity, high female labor turn over, etc…

Beside the formation of HEIA association, ATUT took three steps to work more in depth on WID/Gender issues:

\# Conducted a baseline study entitled "Women and Grapes" on Women owners, manager and labor working in the table grape production and export. The aim of this study is to measure the impact of the horticulture export sector activities on women who constitute the largest share of labor (about 70%).

\# Conducted a study entitled "Feminization of Strawberry" that focused on the following issues: gender roles and division of labor, wage differential, productivity and cost of labor, status of female laborers, constraints facing female laborers, quality control and transfer of technology.

\# Aiming to mainstream gender concerns in the project activity, worked on the issues found by the customers (private sector) to be constraints affecting their business' success, such as productivity, seasonal laborers status/rights, female laborers vis-à-vis male supervisors, quality control, etc…

**Benchmark Established:** The Agricultural Policy Reform Project (APRP) undertook a Phase I and Phase II study on Women's Employment, Income and Participation in the agricultural economy in Egypt. The APRP study did not aim at establishing new bureaucracies to promote women, or to launch new technical assistance projects to support women in their efforts to improve their agricultural lot. Rather, APRP moved into a pioneer area by working on the policy environment in which women work in agriculture and agribusiness, so that their progress can become self-sustaining and permanent. Phase I of the study identified five main areas where women are facing constraints, and which require policy reform: (1) access to land; (2) privatization; (3) technology transfer; (4) agribusiness; and (5) associations. As a result for phase II, a policy benchmark was proposed and approved by the Ministry of Agriculture and Land Reclamation MALR). This benchmark states that: "The GOE/MALR will adopt policies to encourage the creation and success of women-owned and managed agri-businesses, employment for women, increased incomes for women, and access to resources and information for women in agriculture in Egypt  (2-year benchmark)". This Benchmark should have a dramatic effect on the roles of women in agriculture and agribusiness. Women's access to land should improve, as well as their access to information, credit and business services. These improvements should lead to increased employment of and by women, as well as increased investments and improved incomes and security for women and for their employees.

**Current Activity:** The Mission is currently implementing the Workforce Development Diagnostic Assessment team that will perform three industry cluster diagnostic assessments on Agribusiness, Tourism and Information Technology. A gender assessment is a part of this

industry cluster analysis. This analysis has three purposes: to identify constraints to industry competitiveness that are related to gender and occupational segregation between men and women; to point out the effect of the current cluster workforce configuration on women; and, to examine ways in which workforce development activities could serve to improve opportunities for women and their status.

## *Zambia Case Study: Population, Health and Nutrition Activities*

USAID/Zambia has implemented successful PHN programming, in part through its careful attention to the gender issues that often exist in this sector.

The Mission's PHN Advisor suggests the following for integrating gender in PHN programming:

# To be gender sensitive in program development and implementation

# To adopt innovative Information, Education and Communication approaches in working with communities, such as having mixed groups, especially in reproductive health, STDs and HIV/AIDS activities.

# To build capacity for integrated health services at health centers in order to enhance confidentiality, encourage clients to use the services and reduce the waiting time.

# Gender targeting of recipient groups of USAID/Zambia support.

# Analysis of policies which discriminate against women.

# Particular attention to be given to vulnerable groups especially women and children.

# To work with Women NGOs in Zambia –these advocate for improving women's socio-economic status and women's rights in Zambia.

The advantages to doing so are:

# Addressing gender disparities will increase access and retention of girls in school, improve child care and increase female participation in decision making at all levels.

# Gender sensitive health services will be user friendly and will encourage men, women and adolescents to use them thus increasing access to and demand for services.

# Gender sensitive agricultural policies will increase access of females to micro-credit finance, entrepreneuership and appropriate agricultural technology.

Gender Practices in Zambia:

A.  MISSION

1.  Integrating gender in program design (PHN)
2.  Identifying and utilizing synergies across programs
    - Mfuwe Game Reserve (SOI)
    - School Health and Nutrition (SO2) – Ministry of Education
3.  Gender Disaggregated Indicators:  R4s

B.  IN-COUNTRY PARTNERS

#  Integrating gender in in-service training for health workers
#  Integrating gender in policy documents

C.  SOCIAL MARKETING

#  Male and female condoms
#  Peer education programs

D.  INFORMATION EDUCATION COMMUNICATION

#  Billboards
#  TV spots/series on HIV/AIDS integrated interventions
#  Radio programs – English; 7 major Zambian languages
#  Trendsetter newspapers
#  Drama
#  Peer education programs
#  Anti-AIDS clubs

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## Guyana Case Study:  Successes in the Democracy and Governance Sector

USAID/Guyana is a small Mission with a big plan. The Mission Director has worked on women's issues before, and notes that sound, sustainable development work is difficult without addressing gender and equity issues. USAID, she says, takes a leadership role in this regard.

In the year the Director has been there, the Mission has already been successful in getting a skeptical government to agree to work with NGOs who are working on empowerment issues. Women, youth and indigenous peoples are the three groups they agreed to work with – this agreement will go a long way in providing technical assistance and training to the most vulnerable groups in Guyana.

The formation of the Women's Millennium Caucus was a milestone since it crosses not only ethnic lines but political ones as well – a rare occurrence in Guyana where everything is politicized and with primarily race based political parties; this makes forming networks and coalitions among women's organizations very difficult

On the D&G side, where there were only minor activities with women's organizations, our grantee funded five Guyanese women to attend the Vital Voices Conference. Grantee involvement in the Constitutional Reform Commission (CRC) process led to the identification and funding of a gender expert. The expert facilitated consensus among women leaders on the issues which they wanted put forward by the "women's representative" to the Constitutional Reform Commission. As a result, the "Rights" section of the CRC recommendations regarding gender are very strong and were recommended by "consensus" to Parliament in their report. In addition the grantee has supported the participation of the Guyanese women who went to Vital Voices in Uruguay for the planning of the Caribbean Vital Voices Conference in Trinidad at the end of September. The original Vital Voices participants with several other women leaders have formed a new NGO—called the Women's Millennium Caucus which is a cross-racial-religious and -political group that hopes to address issues across this divide. With the support of our grantee they launched the new NGO and had the former President, Janet Jagan, as the feature speaker. Prominent women from all political parties and ethnicities attended—one of the few occasions where women crossed party lines. The two major parties generally represent the two major racial /ethnic groups (Afro-Guyanese and Indo-Guyanese) so political and racial issues are very tied together . The women participants agreed that they must take the lead in bridging this divide.

The Director is working to help the current grantee and the Mission moving forward in forming working relationships with women's organizations in anticipation of our new Civil Society Results Package which will have a women as one of three target groups. Once we determine the grantee for our new D&G SO, we plan to target women's organizations particularly in the civil society strengthening activities and provide intensive strengthening activities for a pilot group and more generic training and technical assistance for a greater number of women's organizations.

The Mission helped to fund Legal Aid PL-480  Title III when we had this source of funding. More recently, we negotiated an agreement with the GOG to continue  funding for Legal Aid from USDA's Section 416 (b) commodity import program. Legal Aid is the only legal assistance available to poor women, many of who have been victims of domestic violence, rape and incest.

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*Theme 5. Mission Officers' Own Gender Examples.*

## B. FACTORS AFFECTING MISSION CAPACITY TO ADDRESS GENDER ISSUES

As part of the preparation and to share with participants in a USAID/G/WID-WIDTECH training workshop for field officers, an electronic questionnaire/self-assessment was administered to 32 registered participants in September 1999. The following is an overview of the responses submitted. Regional Breakdown of Self-Assessments:

\# Twenty-five (25) participants submitted a self-assessment of their Mission. (One dropped out after submitting but it's included here for informational purposes.)

\# Six assessments are from Africa, ten from ANE, one from E&E, and eight from LAC.

\# The AFR submissions came from RCSA, REDSO-ESA(2), South Africa, Tanzania, and Zambia.

\# The ANE submissions came from Egypt (3), Indonesia (3), Morocco, and the Philippines (2).

\# The E&E submission came from Russia.

\# The LAC submissions came from Bolivia, Ecuador, Guyana, Haiti, Nicaragua, Panama (2), and Peru.


## Part I. Respondents' Program Responses on Gender

1. In the following Missions, the respondent provides concrete, practical gender-sensitive advice to specific SO teams (in strategy development, implementation, and/or M&E) – at times the specific sector is not indicated:

\# On an on-going basis:  Ecuador; Egypt (EGAD); Guyana (EGAD and D&G); Haiti (PHN and more); Indonesia (ENV and EGAD – 2 people); Morocco (Financial and EGAD – 2 people); Panama; Peru (EGAD and more); Philippines; REDSO (2 people); South Africa; Zambia (PHN)

\# On a periodic basis:  Bolivia, Nicaragua (ENV/Ag.), Panama, Philippines, Tanzania

2. In the following Missions, the respondent interacts regularly with visiting colleagues, government counterparts, NGO colleagues, AID/W visitors, etc. to discuss gender issues as part of normal duties:  Bolivia, Egypt, Guyana, Haiti, Indonesia (3 people), Panama, Peru, Philippines, REDSO, Tanzania

## Part II. Factors Affecting Individual Capacity to Address Gender Issues

Of the twenty-five respondents to this self-assessment, 10 Officers answered in their capacity as WID Officers, and 14 answered as members of Gender/WID committees and/or SO Team members without any formal WID position (and one answered as all of the above). Their answers on the issues below have been combined.

\# 9 specifically mentioned that they have support from their Mission's senior management.

\# 16 feel that they have support from within the Mission, if not necessarily at senior levels.

\# 2 Officers feel that they *do not* have much support.

\# 14 Officers feel that they have received support from G/WID.

\# 6 Officers feel that they *don't know*, or *have not* received support from G/WID.

\# 14 Officers feel that other donor/NGO groups in their country are helpful in their WID work.

## Part III. Mission Officers' Examples of Why Gender is Important

Nine officers provided concrete examples that they would use to convince colleagues to include gender. These examples included:

\# Addressing gender disparities will increase access and retention of girls in school, improve child care, and increase female participation in decision-making at all levels; gender-sensitive health services will be user-friendly and will encourage men, women and adolescents to use them thus increasing access to and demand for services; gender-sensitive agricultural policies will increase access of females to micro-credit finance, entrepreneurship and appropriate agricultural technologies. (Zambia)

\# In virtually every sector, it is known that when women control the resources, the overall well-being of the family is increased, while it is not the case when men control the resources. (South Africa)

\# Education, safe motherhood, water management. (Morocco)

\# Links between experiences with gender issues in program design and implementation elsewhere, specially with local government (municipalities) and environment. (Panama)

\# Significant roles women play in all aspects of life, not only in the development of this country but also in this office. (Indonesia)

\#   Direct benefits in health, education, income generation, water management and equity. (Morocco)

\#   Successes of two projects:  Women in Enterprise Development (WED), now involved in literacy promotion, and the Capiz Women, Inc., which is involved in policy formulation in the Province of Capiz. (Philippines)

\#   Our successes have been in terms of the tangible results in giving women opportunities in the economic area through microenterprises so that they can enhance their role in decision-making in the family as well as improve the quality of life for their children. In addition, I would point to the countries in which we have increased women's literacy and where we have increased girls' school attendance and retention. Certainly in the area of family planning and child spacing USAID has made a major contribution to improving the health of women and children. (Guyana)

\#   Work with SO Team, sharing information on ongoing women-focused projects and statistics describing the status of women in contemporary Russia. (Russia)